

Monthly Status Reporting

Revision Working Team

Meeting Minutes

DAY: 10/11/06
TIME: 11:00am - Noon
LOCATION: 3900 Conference Room 39A

Meeting Called By:	Gaye Mays		
Meeting Purpose:	Identify “Top Ten” Issues/Problems with the Current Process		
Attendees: (* attended by phone)	Gaye Mays – EPMO Steve Tedder - EPMO David Butts - Wildlife Resources Commission	Bob Giannuzzi - EPMO Barbara Swartz – Strategic Initiatives Richard McGee – EPMO/QA	Greg Jones – Crime Control(unable to attend) Lucy Cornelius – DHHS Manny Zech – DOT
Meeting Documents:	NA		
Attachments:			
Next Meeting:	Wednesday 10/18 @ 11am Call-in number 919-754 - 6675		

Discussion Points

1	<p>Discussion topics: <i>Audience for monthly status reports:</i> Wildlife Resources & DHHS complete weekly, bi-weekly and/or monthly status reports for various levels of management to include program managers, CIO and Executive Director. DOT only reports upward on an exception basis.</p> <p>Discussion took place regarding the feasibility of a report format in the PPM tool that could satisfy the agency external reporting needs. Items identified that would be helpful were 1) the ability to track schedule and schedule variance 2) ability to define project deliverables and track variance 3) ability to track earned value 4) need a better way to show explanations of “jelly bean” status to executives.</p> <p><i>Next step</i> – each representative will review the PMO Council status reports examples and determine the best format to replace the current PPM tool report format or provide a copy of a current status report used in their agency that has proven to be effective.</p>
2	<p>Key problems/issues identified with current process: (additional items added from participants list; “Top 10” items are in bold type)</p> <ol style="list-style-type: none"> Difficulties with using the PPM tool/overall inflexibility Tool should measure triple constraints (scope, cost, schedule) but currently does not measure these accurately We should be reviewing total budget dollars spent rather than expenditures by phase/should review if the agency has the funding to complete the project Project schedule measurement is “time consumption” rather than an “earned value” type metric Under utilization of resources is viewed as a negative Need to more clearly define milestones to make them more meaningful “Jelly Beans” should measure deviation from the plan Process is of no value to the PM except to meet EPMO/SCIO requirements; agency does not use this status reporting process to manage their projects

	<p>9. Agencies must keep separate financial records to capture project costs and then enter into the PPM tool; need the ability to capture information and automatically update the tool.</p> <p>10. PPM tool does not accommodate the conceptual phase of a project, thus when the project meets the criteria to be input into the tool, the level of detail required may be difficult to capture and the PM must complete a number of “catch up” status reports</p> <p>11. Each individual needing to review a status report must have a license to do so</p> <p>12. PPM tool does not accommodate other development methodologies such as “Agile”</p> <p>13. Cannot see appropriate detail in current tool status report i.e. detail on issues and risks</p> <p>14. Tool should not allow user to change information considered protected i.e. the color of “jelly beans”</p> <p>15. Limited capacity for comments and ability to reference historical information</p> <p>16. Allows costs numbers to be entered at other than Level 4, creating accounting errors later.</p> <p>17. Allows budget changes in P & D during P & D.</p> <p>18. Criteria for satisfactory milestones vague.</p> <p>19. Earned value not considered.</p> <p>20. Importing data not automated.</p> <p>21. Green project funding almost impossible – gate issue not status report.</p> <p>22. Scope criteria vague.</p> <p>23. Dollars and hours totals not calculable from previous month.</p> <p>24. Comment fields with jelly beans limited in space.</p> <p>25. Tool does not have capabilities to track variance via a deliverables based method</p> <p>26. Thresholds inflate variances for smaller, shorter duration projects, causing variances to appear significant when there is no real problem</p> <p>27. UMT is read-only if project is during phases. Cannot provide status during a sign-off.</p> <p>28. Issues management section tends to be used for project reporting issues not project issues</p> <p>29. Time management is not integrated into UMT tool. Difficult to accurately reconcile time for all resources.</p>
3	<p>Project Approach:</p> <ul style="list-style-type: none"> • Define audience for monthly status reports - <i>completed</i> • Define elements that should be included in status reports • Define status codes (red, green, yellow, etc.) • Collect example reports already in use

Action Item Updates

1	Team – Provide “best example” of a status report at 10/18 meeting